PHILIPPINE INSTITUTE FOR DEVELOPMENT STUDIES
Surian sa mga Pag-aaral Pangkaunlaran ng Pilipinas
Service through policy research
18F Three Cyberpod Centris, North Tower EDSA corner Quezon Avenue, Quezon City
Tel: (632) 372-1291 / 372-1292 ▪ http://www.pids.gov.ph

REQUEST FOR PROPOSAL

1. The Philippine Institute for Development Studies (PIDS) invites all eligible individual consultants to submit proposals for the **Health Policy and Research Fellow (Benefit Design and Value-Based Financing) for The PhilHealth-PIDS Policy and Research Fellowship Program under the 2025-2027 RISE Mission Research Project.**

2. The Approved Budget for the Contract (ABC) is **PhP960,000.00.**

3. Interested consultants must submit the following documents using PIDS the prescribed forms:
   a) Curriculum Vitae of the proposed Consultant(s)[1]
   b) Technical Proposal Form[1]
   c) Financial Proposal Form[1]
   d) Filled out Data Privacy Notice and Personal Data Protection Form[1]
   e) Statement of Completed contracts[2]
   f) Statement of All Ongoing and Awarded But Not Yet Started Contracts[2]
   g) Notarized Omnibus Sworn Statement (for ABC above PhP50,000.00) [1]
   h) Income/Business Tax Returns (for ABC above PhP500,000.00) [1]
   i) PhilGEPS Registration Number (certificate or screenshot) [1]
   j) Valid Mayor's/Business Permit (Firm) or BIR Certificate of Registration[3] (Individual).
   k) Image of Official Receipt or Service Invoice (*required for individual consultants during payment)*

4. Interested consultants may obtain further information from the Procurement Management Division at telephone via email at procurement@pids.gov.ph.

5. The Institute shall adopt the Quality-Based Evaluation procedure in selecting consultants based on the attached Terms of Reference.

6. The deadline for submission of proposals is on **26 February 2026 (5:00 PM)** addressed to:

   The BAC Chairperson for Consultancy
   Services c/o The BAC Secretariat
   Procurement Management Division
   18/F Three Cyberpod Centris – North Tower, EDSA cor. Quezon Ave., Quezon City

   Proposals may also be submitted through email at procurement@pids.gov.ph .

7. PIDS reserves the right to reject any or all of the proposals, declare a failure of bidding, or not award the contract if there is evidence of collusion, including any act that restricts, suppresses, or nullifies competition, or if there is a failure to follow the prescribed bidding procedures. PIDS also reserves the right to waive any required formality in the proposals received and select the proposal it determines most advantageous to PIDS.

DR. CONNIE B. DACUYCUY
Chairperson
PIDS-BAC for Consultancy Services

Reference No.:2026-053

[1]Applicable for individual consultants and firms
[2]Applicable for firms only

Note: PIDS is evaluating its consultant's performance based on the quality of services rendered, timeliness of delivery, customer/after sales service and overall quality of service.

Philippine Institute for Development Studies
TERMS OF REFERENCE

Health Policy and Research Fellow (Benefit Design and Value-Based Financing)[1] for The PhilHealth-PIDS Policy and Research Fellowship Program under the 2025-2027 RISE Mission Research Project[2]

1. Background and Rationale

PhilHealth, as the national health purchaser, is mandated under the Universal Health Care Act to pursue strategic provider payment reforms that expand coverage, improve efficiency, and enhance financial protection. In the coming months and years, PhilHealth is expected to implement path-breaking reforms such as expanding benefits packages to cover outpatient services, improving the current all-case rate or ACR system to increase support value, and introducing Diagnosis-Related Groups (DRGs) and Global Budgets (GB) as a medium-term reform for fairer inpatient payment. The effective design and implementation of these reforms require information and technical expertise in policy research, data analytics, costing, and monitoring and evaluation - capacities currently limited within the institution. To help bridge this gap, PhilHealth partnered with the PIDS Health Economics and Finance Program to provide sustained technical support, generate policy-relevant evidence, and build institutional capacity. This partnership involves the implementation of a Fellowship Program designed to enhance institutional and sectoral capacity for health financing reforms.

2. Objectives of the Research and Policy Fellowship Program

The PhilHealth-PIDS Fellowship Program has two goals:

- **Institutional:** Train professionals in **6 key reform areas (KRA) (see below)** while they engage and participate in PhilHealth's implementation of path-breaking health financing reforms.
- **Sectoral:** Develop a pool of experts in health financing, particularly in areas where the country currently has limited capacity (e.g., provider payment systems, value-based financing, and quality of care), which are essential to the reform agenda of PhilHealth. As the health financing system matures, these skill sets will become even more critical to sustaining and advancing reforms.

[1] The Consultant may be an individual or a firm.
[2] This engagement will be charged against the project 2025-2027 PhilHealth RISE Mission Project.

Table 1. Key Reform Areas and Strategic Shifts Targeted by the PhilHealth-PIDS Fellowship

Key Reform Area	Target PhilHealth Strategic Shift	Relevant PhilHealth Units/Offices
Provider Payment Reform	From ACR-based retrospective payment → DRG-based prospective global budget	UHCST, Office of the PCEO, BDRD
Monitoring and Performance	From Output-based monitoring → Outcome-based performance monitoring and purchasing	OPCEO, PhilHealth Quality Assurance Group (QAG)
Audit and Compliance	From manual manpower-driven post-audit → Automated flagging of deviation based on standards of care	OPCEO PhilHealth Internal Audit Group
Contracting and Provider Engagement	From Accreditation → Contracting (ready dossier per facility)	OPCEO PhilHealth Accreditation
Benefit Design and Value-Based Financing	From one-size-fits-all benefit design → Market-based, needs-responsive benefit design	PhilHealth UHCST, Office of the PCEO, BDRD
Data Analytics and Business Intelligence	From Request-driven data extraction → Real-time business intelligence	Information Management Sector (IMS), TFI, Actuary

3. Objectives of the Consultancy

In this light, there is a need to engage a **Health Policy and Research Fellow** for the **specific key reform area** under a consultancy engagement to support the Program's goals and the main project's objectives.

4. Scope of Work, Deliverables, and Schedule of Payment Releases

Under the guidance and technical oversight of the PIDS Health Economics and Finance Program Director and the PhilHealth-PIDS Fellowship Program Manager, the **Health Policy and Research Fellow** is expected to work with the PIDS HEFP and relevant PhilHealth offices and undertake the following tasks/activities:[3]

1. Serve as a technical expert in the assigned key reform area and provide evidence-informed guidance to support reform design and implementation.

[3] If the Consultant needs to undertake physical/ face-to-face interviews and data collection and related activities, the Consultant has to ensure compliance with existing and future policies, rules, and resolutions as may be issued by concerned government agencies pertaining to health and safety.

2. Navigate institutional processes and work collaboratively with relevant stakeholders such as PhilHealth offices to advance the operationalization of reforms.
3. Bridge the technical and operational dimensions of the assigned KRA by translating analytical outputs into implementable recommendations.
4. Process, manage, and analyze data and the broader evidence base required to inform decisions within the KRA.
5. Develop clear, concise, and actionable policy notes, technical briefs, and other knowledge products to support decision-makers.
6. Communicate the reform agenda effectively to diverse audiences, including policymakers, legislators, development partners, academics, and practitioners.
7. Engage and consult with relevant stakeholders such as PhilHealth offices, the World Bank, the Thai Case Mix Center, and other local and international experts as needed.
8. Prepare for, participate in, and present at internal workshops, technical meetings, and client discussions with PhilHealth, DOH, and other stakeholders.
9. Report in person at PIDS and PhilHealth offices as directed by the Program Director, Program Manager, or concerned supervisor PhilHealth
10. Sign a Non-Disclosure Undertaking with PIDS. Any information gathered and generated in the implementation of the project shall be processed subject to the applicable provisions of the Republic Act. No. 10173, known as the "Data Privacy Act of 2012" and its Implementing Rules and Regulations and relevant issuances of the National Privacy Commission (NPC); and
11. Perform such other professional, highly technical, and confidential duties and responsibilities as the Research fellow may assign from time to time.

The Health Policy and Research Fellow will prepare the following outputs based on the schedule below:

Activities and Deliverables[4]	**Due Dates**	**Payment Tranches**
Inception Report following PIDS template including proposed work plan and topic/s for the proposed policy note	1 month after signing (Indicative: March 31, 2026)	10%
Monthly Accomplishment Report • Documentation of all activities conducted during the period, following the prescribed template by the HEFP	April 31, 2026	8%
First Quarter Accomplishment Report, Documentation of all activities conducted during the period, following the prescribed template by the HEFP	May 31, 2026	10%

[4] For applicable outputs, the draft and final reports submitted by the consultants should be aligned with the following guidelines: PIDS' Guide in the Preparation of Manuscript for Publication and General Guidelines in Preparing and Formatting a PIDS Discussion Paper, Guidelines in the preparation of Policy Notes.

For research outputs that will be released as a PIDS Discussion Paper (DP), the consultant shall prioritize the publication outlets of PIDS, particularly the peer-reviewed Philippine Journal of Development (PJD) and Research Paper Series (RPS). If the DP is not selected by PIDS Management for publication either as a PJD article or an RPS issue, the consultant may identify other dissemination outlets outside of PIDS. Guidelines for Authorship in PIDS Research Projects shall apply.

Draft Policy Note #1		
Monthly Accomplishment Report • Documentation of all activities conducted during the period, following the prescribed template by the HEFP	June 30, 2026	8%
Monthly Accomplishment Report Documentation of all activities conducted during the period, following the prescribed template by the HEFP **Final Policy Note #1**	July 31, 2026	8%
Second Quarter Accomplishment Report • Documentation of all activities conducted during the period, following the prescribed template by the HEFP	August 31, 2026	8%
Monthly Accomplishment Report • Documentation of all activities conducted during the period, following the prescribed template by the HEFP	September 31, 2026	8%
Monthly Accomplishment Report • Documentation of all activities conducted during the period, following the prescribed template by the HEFP	October 31, 2026	8%
Third Quarter Accomplishment Report and Draft Policy Note #2 • Documentation of all activities conducted during the period, following the prescribed template by the HEFP	November 30, 2026	12%
Terminal Report and Final Policy Note #2 **Turnover of draft and materials** used together with Certification indicating the turnover of as well as the deletion of such data and that it will allow PIDS to verify if the data is complete	January 31, 2027	20%

NOTE: Payments will be based on the acceptance and approval by PIDS of the corresponding outputs.

5. Qualifications of the Policy and Research Fellow

<table>
<tr><td>Education</td><td>At least a Bachelor's degree in disciplines relevant to the key reform areas below
Desired: Master's degree in disciplines relevant to the key reform

<table>
<tr><th>Key Reform Area</th><th>Relevant disciplines</th></tr>
<tr><td>Provider Payment Reform</td><td>Health economics, health financing, data science, with background in hospital costing and DRG analytics</td></tr>
<tr><td>Monitoring and Performance</td><td>Public health, monitoring & evaluation, health systems research</td></tr>
<tr><td>Audit and Compliance</td><td>Data Science, clinical audit, health informatics, artificial intelligence, machine learning</td></tr>
<tr><td>Contracting and Provider Engagement</td><td>Law, institutional economics, public administration</td></tr>
<tr><td>Benefit Design and Value-Based Financing</td><td>Health economics, benefit design, actuary, behavioral economics</td></tr>
<tr><td>Data Analytics and Business Intelligence</td><td>Data Science, statistics, information systems</td></tr>
</table></td></tr>
<tr><td>Experience</td><td>At least 5 years of professional experience working in the development sector</td></tr>
<tr><td>Competencies</td><td>– Advanced-level core competencies: deliverability/ results-oriented, professionalism, adaptability, and communication skills
– Advanced-level functional competencies: data gathering, problem-solving and analysis; dissemination; and technical writing
– Intermediate-level functional competencies: project/research implementation, and management; and research conceptualization
– Superior skills in quantitative and qualitative analyses and communication</td></tr>
</table>

6. Project Duration

The engagement will commence upon the signing of the contract until **January 31, 2027**, on a part-time basis. The consultant's work must be completed within this period, and no man-days will be chargeable after this date.

7. Approved Budget for the Contract

The approved budget for this consulting service is up to **PHP 960,000.00 <u>depending on the qualifications</u>**, charged against the three phases of the PIDS-PhilHealth RISE Mission Partnership.

Phase/Tranche	Amount
Phase 1	PHP 320,000.00
Phase 2	PHP 480,000.00
Phase 3	PHP 160,000.00
Total	**PHP 960,000.00**

This amount does not include travel and accommodation during fieldwork. PIDS will shoulder the cost of fieldwork (if any). PIDS shall not cover hospitalization and other COVID-related health expenses of the consultant as no employer-employee relationship exists between the PIDS and the Consultant.

8. Evaluation Criteria

a. Evaluation Criteria

Applicants will be revaluated based on the following criteria:

Health Policy and Research Fellow Qualifications Education • At least a **Bachelor's Degree** in relevant discipline in the specific key reform area • Desired: Master's Degree in a relevant discipline in the specific key reform area Training and experience • At least 5 years of professional experience as a research/policy analyst in public health, health systems, or health financing Competencies • Advanced-level core competencies: deliverability/ results-oriented, professionalism, adaptability, and communication skills • Advanced-level functional competencies: data gathering, problem solving and analysis; dissemination; and technical writing • Intermediate-level functional competencies: project/research implementation and management; and research conceptualization	50%

• Superior skills in quantitative and qualitative analyses and communication	
Plan of approach and methodology; • Clarity, feasibility, innovativeness, and comprehensiveness of the approach • Incisive interpretation of problems and reflection on suggested solutions	50%
Total	100%

b. Detailed rating sheet (see attached file)

Prepared by: **VALERIE GILBERT T. ULEP, PhD**
Project Director

Reviewed and approved by:

CHRISTINE RUTH P. SALAZAR
Officer-in-Charge, Research Services Department